Microsoft Teams End User Guide

for

Information Technology Support Services Contract

Version 1.0

National Labor Relations Board

Office of the Chief Information Officer

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Revision History

Name	Date	Reason for Changes	Version
Puyenpa Services	05/31/2019	Initial Submission to NLRB	1.0

1   Executive Overview

The purpose of this document is to provide end user with all the relevant information regarding usage of Microsoft Teams in NLRB. Teams will be the replacement for skype for business and will be used by agency members for a variety of purposes. It will serve as a communicator, document sharing system and for planning/management of resources to accomplish the day to day tasks. Teams integrate tightly with a variety of Microsoft 365 products like SharePoint Online (agency intranet), Power Platform, Stream and Planner which the agency will be adopting for respective needs.

2   What is Microsoft Teams?

Microsoft Teams is a persistent chat-based collaboration platform complete with document sharing, online meetings, and many more extremely useful features for business communications.

Having an excellent team space is key to being able to make creative decisions and communicate with one another. Shared workspace software makes this much easier to achieve, especially if a team is based in a very large company, has many remote employees, or is made up of a significant amount of team members.

Microsoft Teams has many core components that make it stand out from other collaboration software:

- **Teams and channels**. Teams are made up of channels, which are conversation boards between teammates.
- **Conversations within channels and teams**. All team members can view and add to different conversations in the General channel and can use an @ function to invite other members to different conversations, not unlike Slack.
- **A chat function**. The basic chat function is commonly found within most collaboration apps and can take place between teams, groups, and individuals.
- **Document storage in SharePoint**. Every team who uses Microsoft Teams will have a site in SharePoint Online, which will contain a default document library folder. All files shared across all conversations will automatically save to this folder. Permissions and security options can also be customized for sensitive information.
- **Online video calling and screen sharing**. Enjoy seamless and fast video calls to employees within your business or clients outside your business. A good video call feature is great to have on a collaboration platform. One can also enjoy simple and fast desktop sharing for technical assistance and multi-user real-time collaboration.
- **Online meetings**. This feature can help enhance your communications, company-wide meetings, and even training with an online meetings function that can host up to 10,000 users. Online meetings can include anyone outside or inside a business. This feature also includes a scheduling aid, a note-taking app, file uploading, and in-meeting chat messaging.
- **Audio conferencing**. This is a feature you won't find in many collaboration platforms. With audio conferencing, anyone can join an online meeting via phone. With a dial-in number that spans hundreds of cities, even users that are on the go can participate with no internet required. Note this requires additional licensing.

- **Full telephony**. That's right! The days of seeking VoIP vendors and overspending on a phone system are finally over. Microsoft Teams can completely replace your business' existing phone system. Note this requires additional licensing.

3   Does Teams replace SharePoint?

No, Microsoft Teams and SharePoint are two completely different platforms with different capabilities and uses. SharePoint's strength lies in storing and managing your documents. Teams, on the other hand, is a collaboration hub that simplifies the experience of working with Office 365. When organizations first deploy Teams, there's often some confusion about where files are stored and where they should be worked on because users see the File tab within Teams.

The most important thing to understand is that the content accessed through Teams—whether through the Files tab or shared via chat—is actually stored in SharePoint or OneDrive for Business.
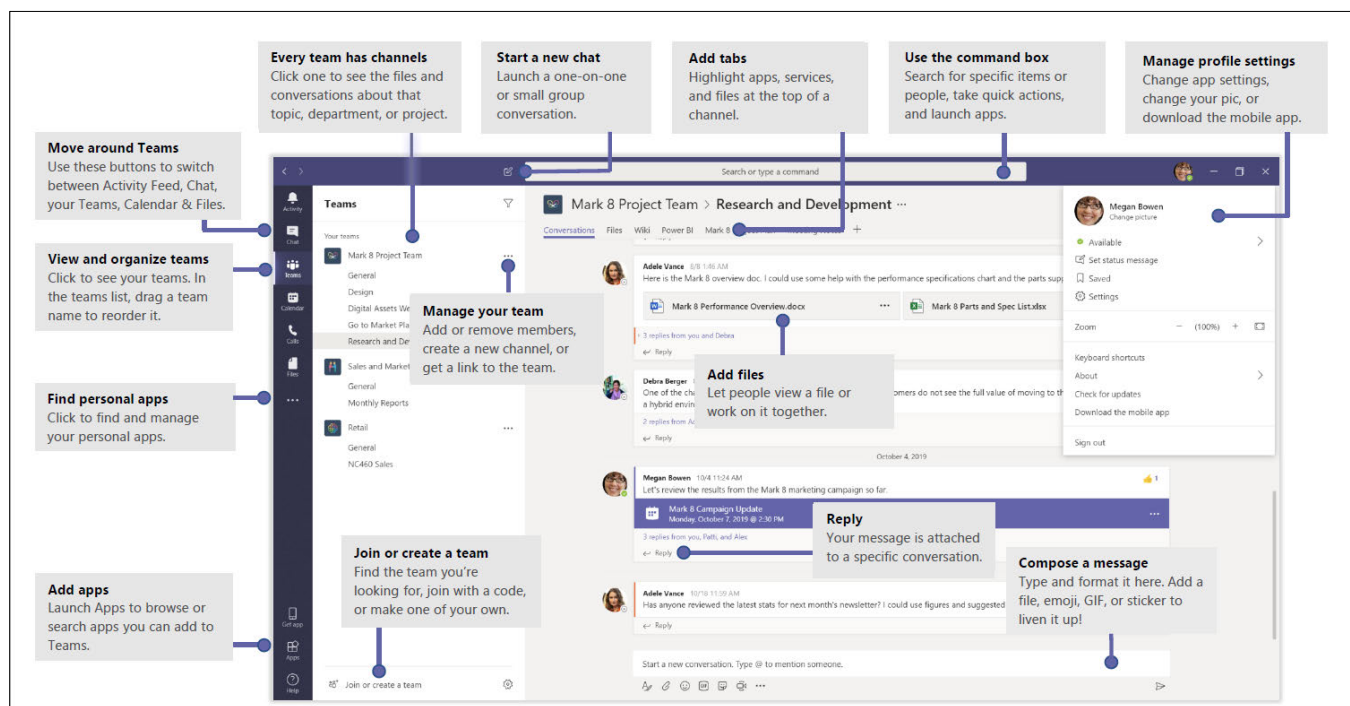
4   Overview of Teams Features

Figure 1: Overview of Teams Features

5   Detailed Features and Using Teams

5.1   Sign In

Once OCIO rolls out teams to the entire agency, users should be able to find it by going to the **Start** > **Microsoft Teams**. Enter your agency email address and click on '**Next**'.
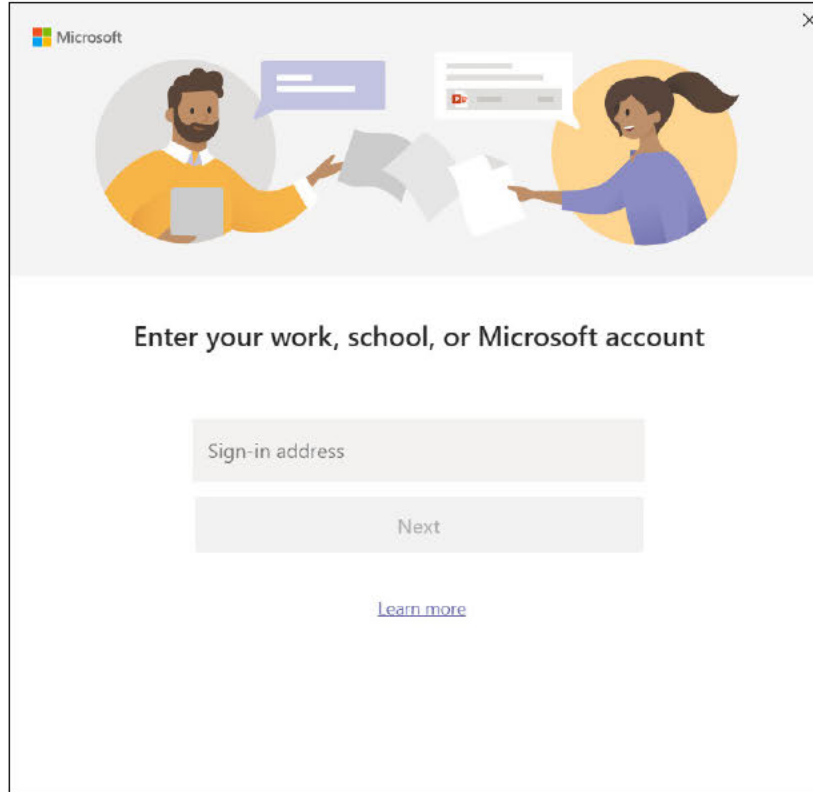
Figure 2: Sign-in Screen

5.2 Pick a team and channel

A team is a collection of people, conversations, files, and tools—all in one place. A channel is a discussion in a team, dedicated to a department, project, or topic. Click **Teams** and select a team. Pick a **channel** to explore the Conversations, Files, and other tabs.
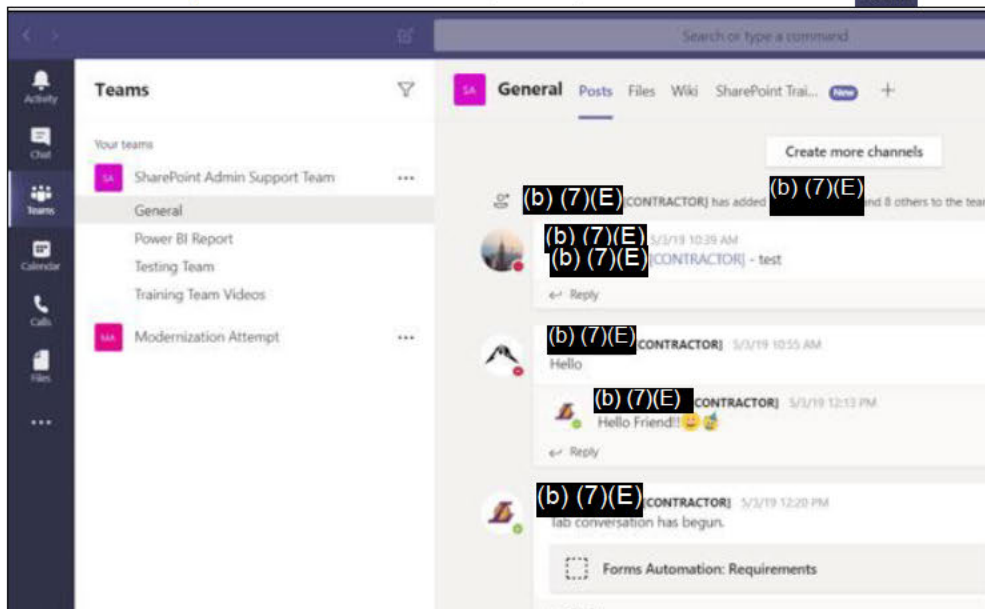

Figure 3: Pick a Team or Channel

5.3 Start a conversation

With the whole team, click **Teams**, ![Teams icon] pick a team and **channel**, write your message, and click Send. ▷

With a person, click on any contact in **Chat**, write your message, and click **Send** ▷

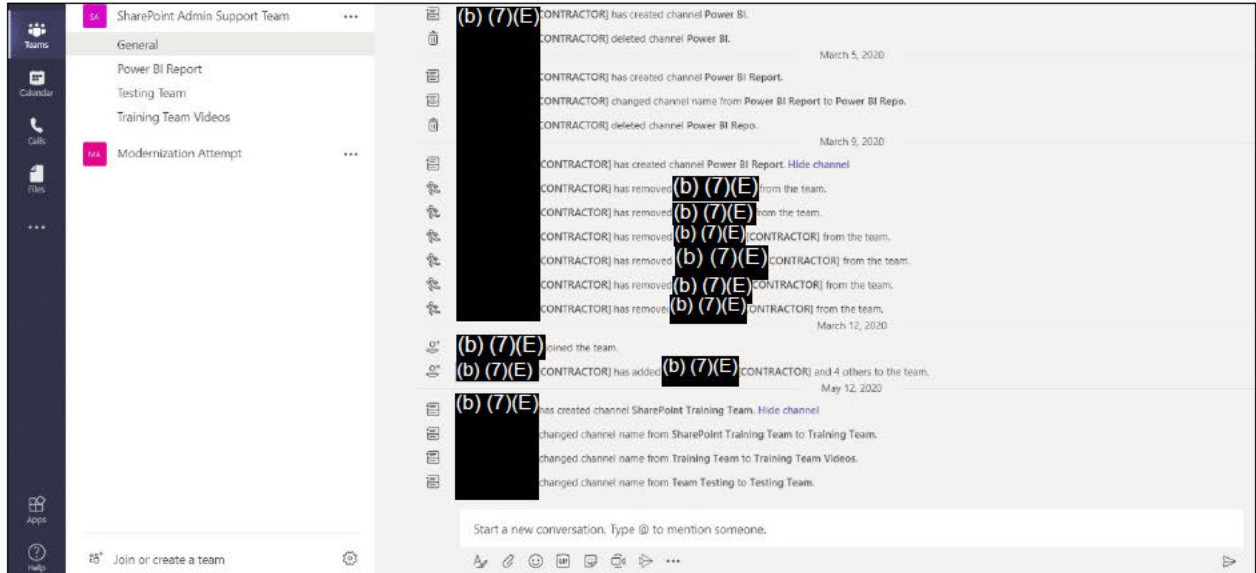You can find people in your organization by typing @<name> in the **search bar** on the top.

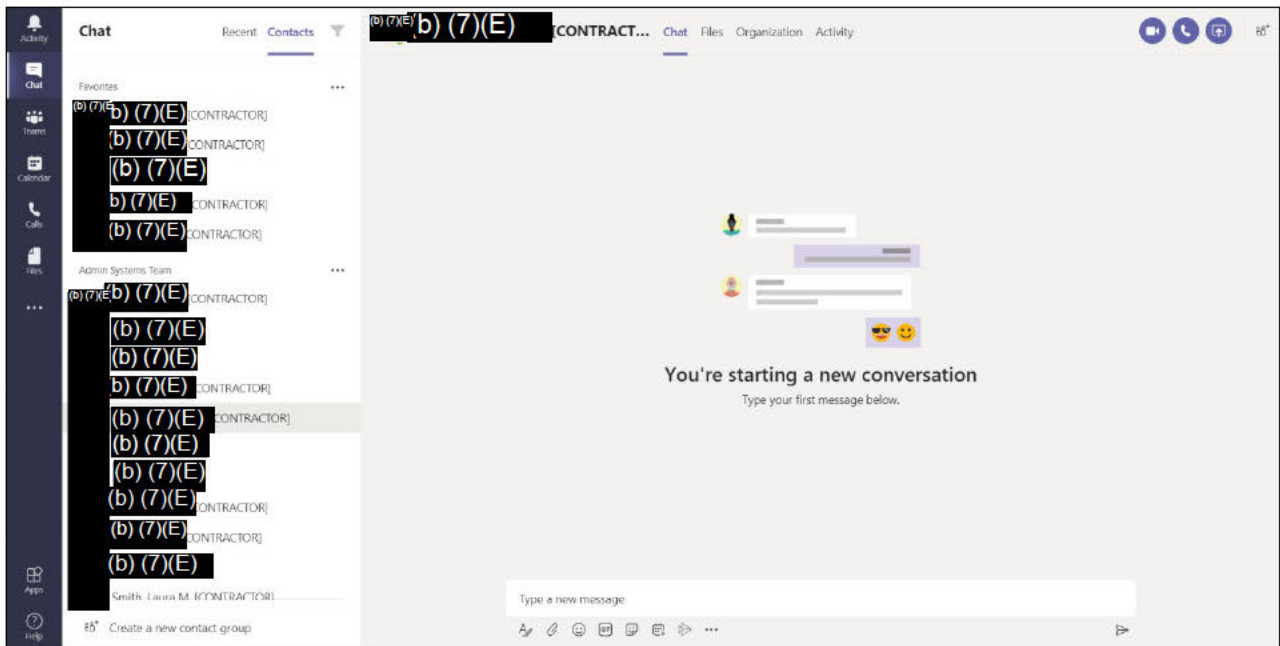**Figure 4: Send a message to everyone in a Team/Channel**
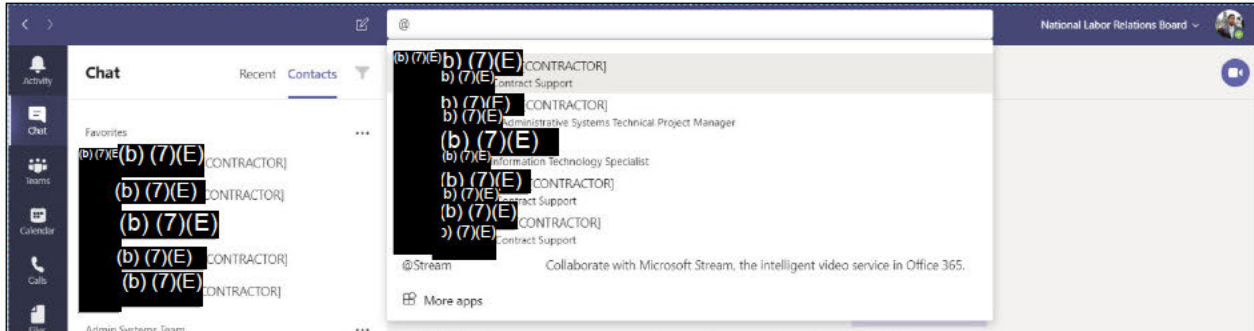

Figure 5: Start a conversation with a contact

Figure 6: Find an agency user/member using Search Box

5.4 Start a Meeting

Click Meet now ⬛ under the area where you type a message to start a meeting in a channel. (If you click **Reply**, then **Meet now**, ⬛ the meeting is based on that conversation.) Enter a name for the meeting, then start inviting people.
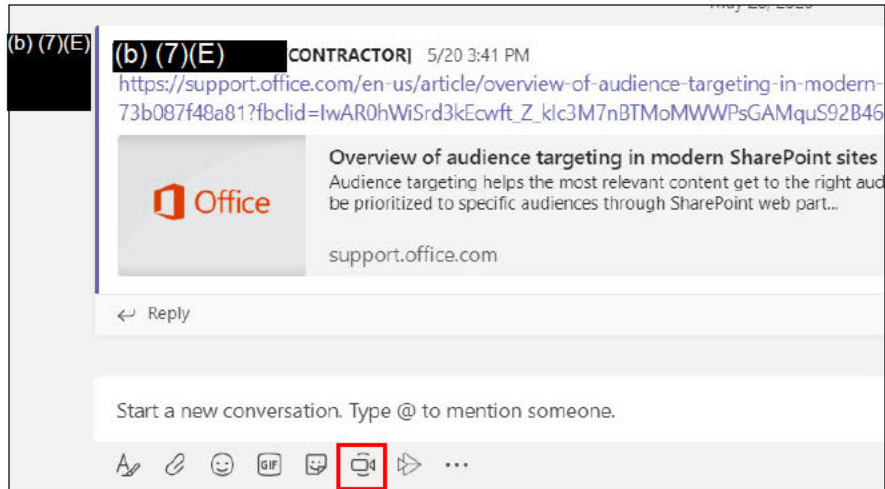

Figure 7: Start a Meeting

5.5 Make video and audio calls

Click **Video call** 🔵 or **Audio call** 🔵 to call someone from a chat. To dial a number, click **Calls** 🔵 on the left and enter a phone number. View your call history and voicemail in the same area.
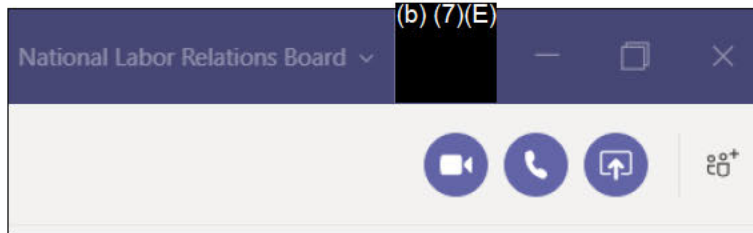

Figure 8: Make video and audio calls

5.6 @Mention Someone

To get someone's attention, type @, then their name (or pick them from the list that appears). Type **@team** to message everyone in a team or **@channel** to notify everyone who favorited that channel.
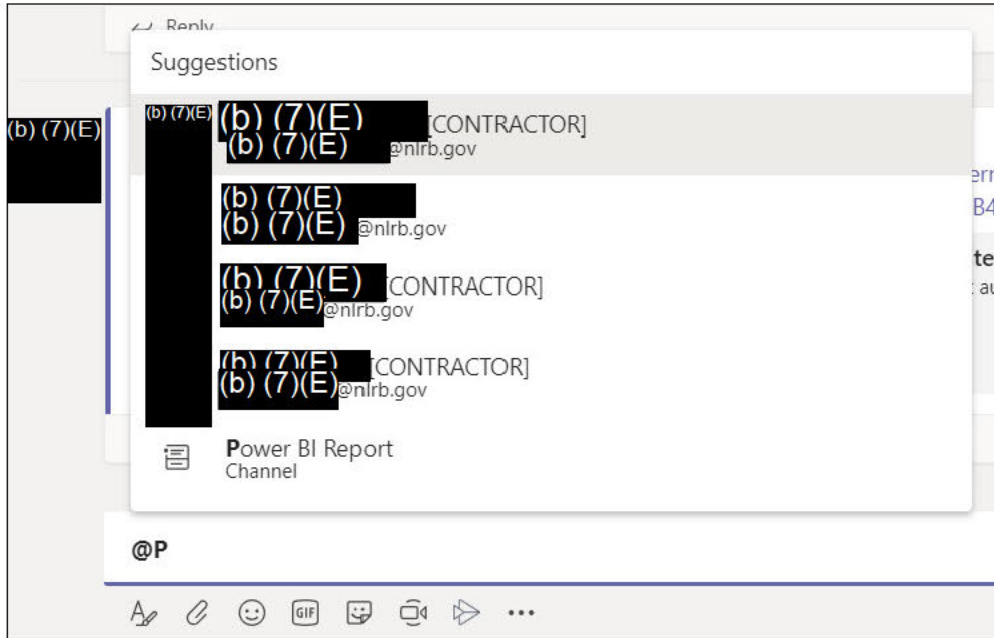

Figure 9: @Mention Someone

5.7 Reply to a conversation

Channel conversations are organized by date and then threaded. Find the thread you want to reply to, then click **Reply**. Add your thoughts and click **Send** .
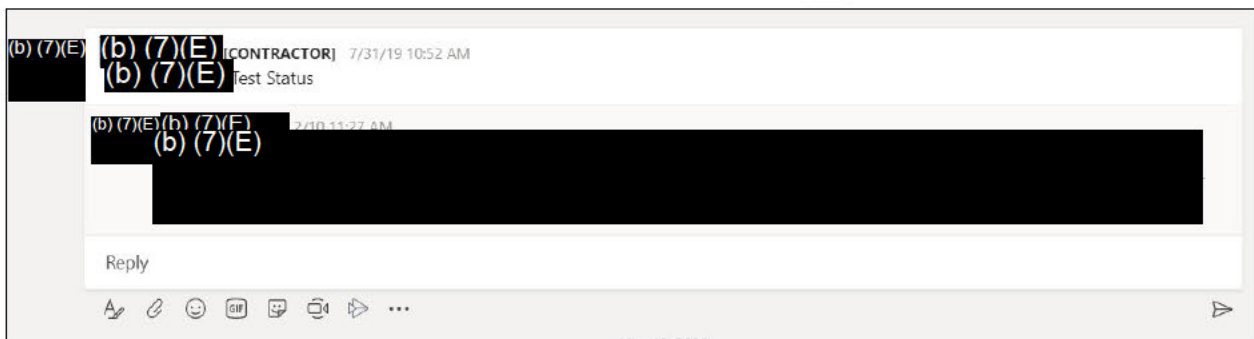
Figure 10: Reply to a conversation

5.8   Add an emoji, meme, or GIF

Click **Sticker** 😊 under the box where you type your message, then pick a meme or sticker from one of the categories. There are also buttons for adding an emoji or GIF.
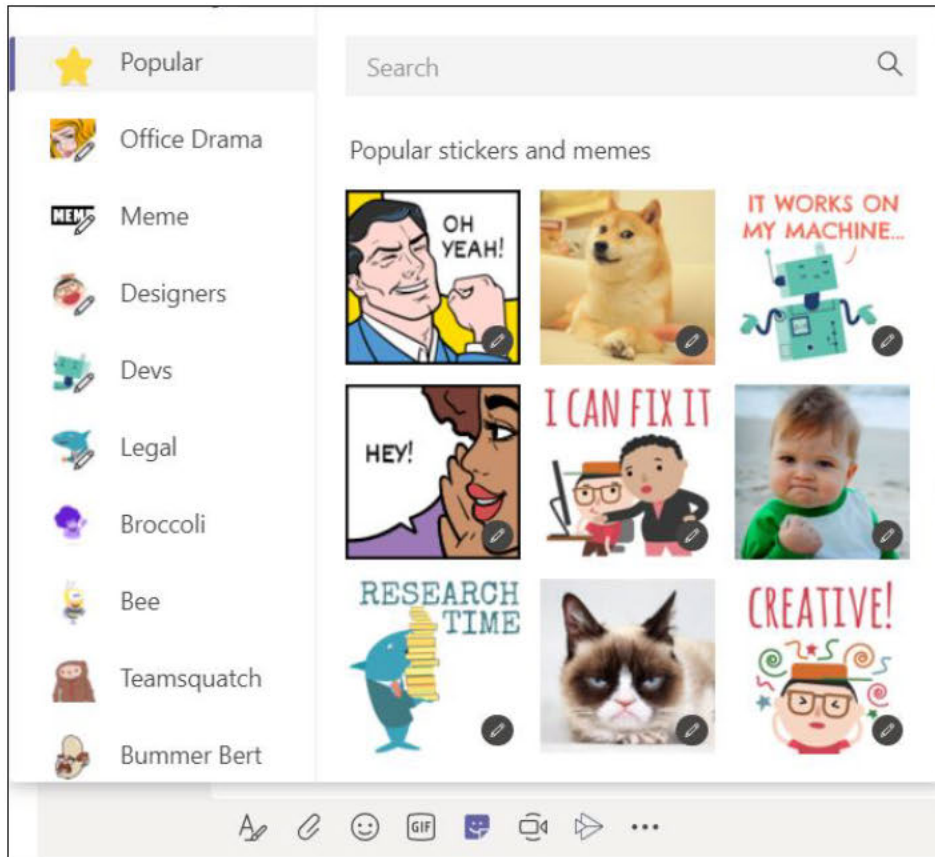
Figure 11: Add an emoji, meme, or GIF

5.9   Stay on top of things

Click **Activity** 🔔 on the left. The **Feed** shows you all your notifications and everything that's happened lately in the channels you follow.

Figure 12: Stay on top of things

5.10 Share a file

Click **Attach** 📎 under the box where you type messages, select the file location and then the file you want. Depending on the location of the file, you'll get options for uploading a copy, sharing a link, or other ways to share.
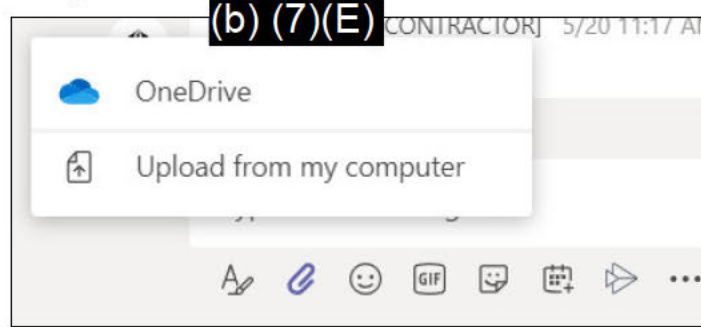

Figure 13: Share a file

5.11 Add a tab in a channel

Click + by the tabs at the top of the channel, click the app you want, and then follow the prompts. Use Search if you don't see the app you want.
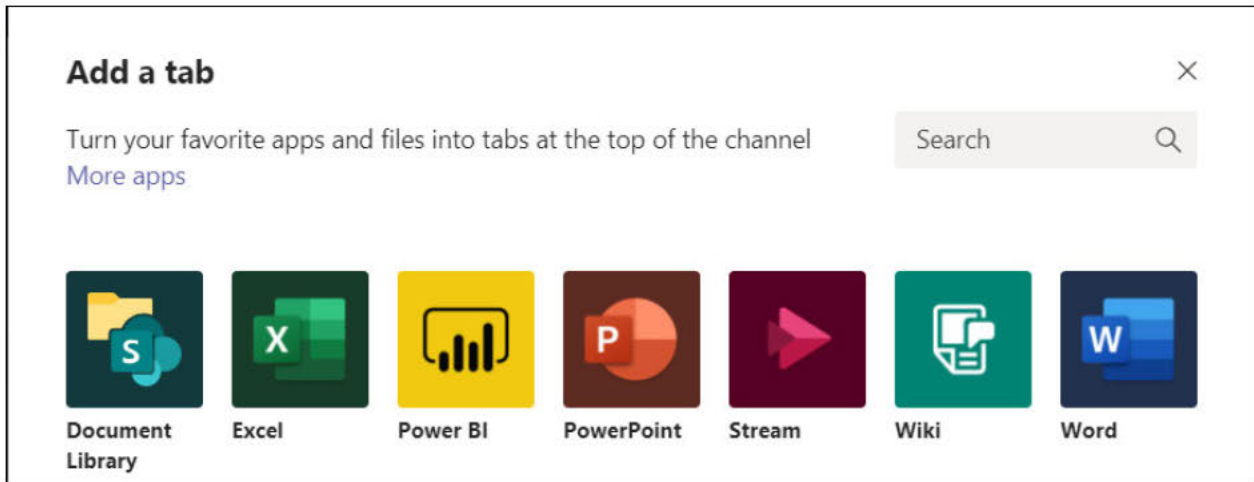
Figure 14: Add a tab in a channel

5.12 Work with files

Click **Files** 📄 on the left to see all files shared across all of your teams.
Click **Files** at the top of a channel to see all files shared in that channel.
Click **More options** ... next to a file to see what you can do with it.
In a channel, you can instantly turn a file into a tab at the top!
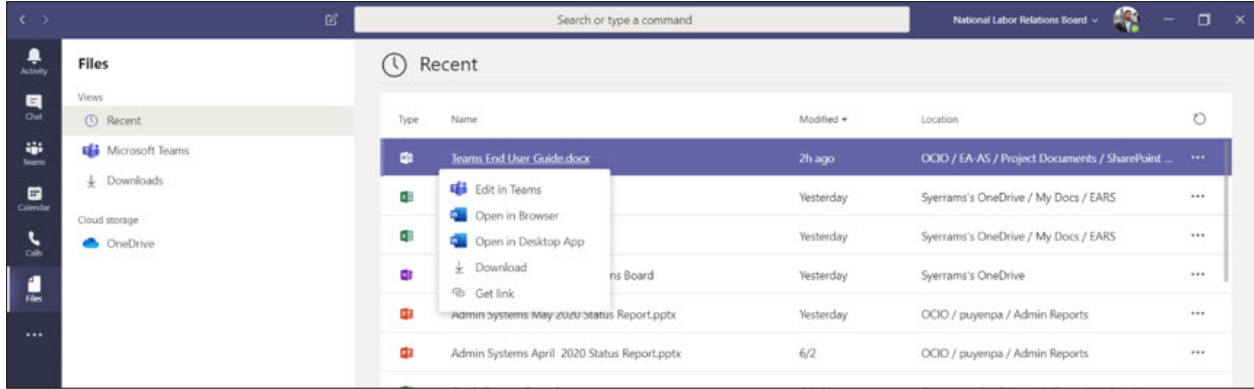
Figure 15: Work with Files

5.13 Search for Stuff

Type a phrase in the command box at the top of the app and press Enter. Then select the **Messages**, **People**, or **Files** tab. Select an item or click **Filter** ▽ refine your search results.
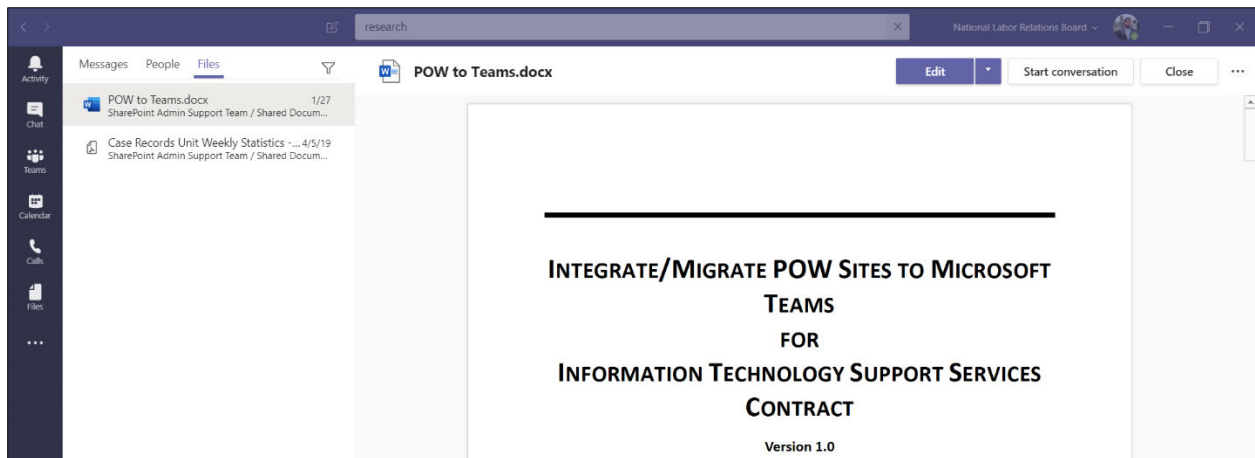
Figure 16: Search for Stuff

5.14 Add Apps

Click **Apps** ⊞ on the left. Here, you can select apps you want to use in Teams, choose the appropriate settings, and **Add**.
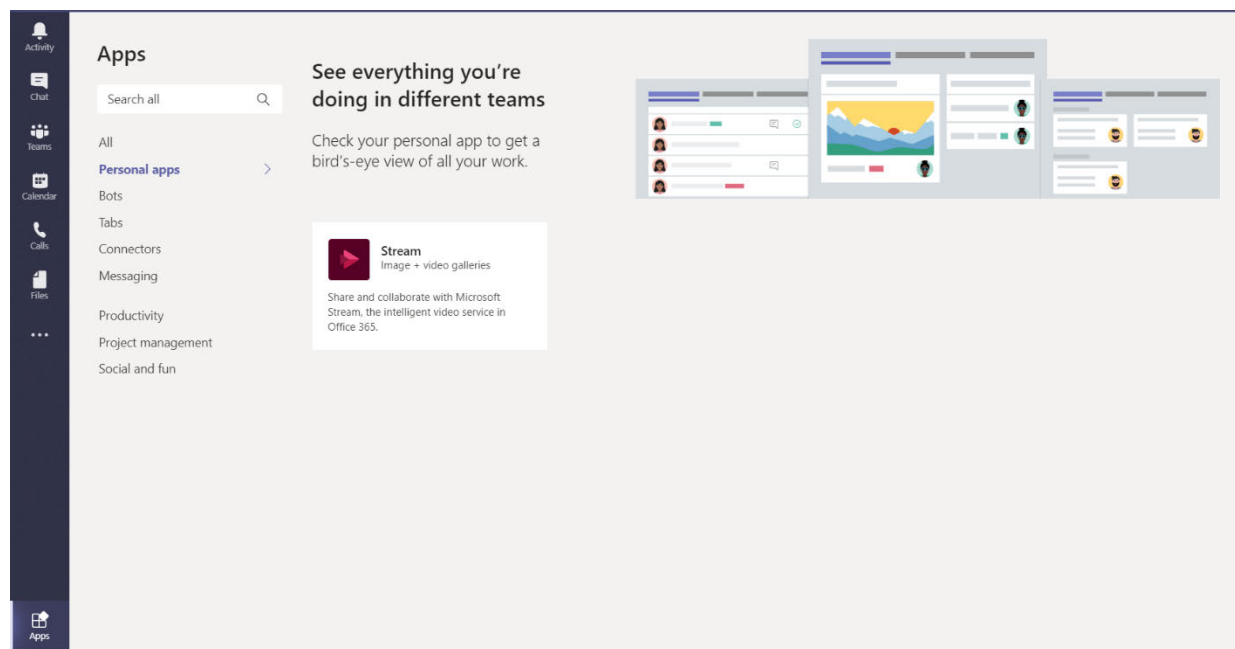
Figure 17: Add Apps

5.15 Find your personal apps

Click **More added apps** ▪▪▪ to see your personal apps. You can open or uninstall them here. Add more apps under **Apps** 🔲
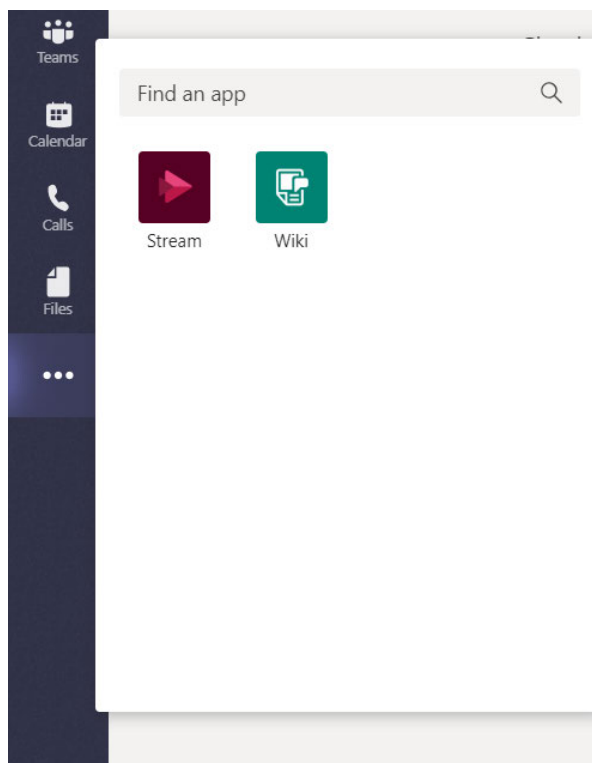
Figure 18: More added apps

What is Teams?

- Teams is a chat-based collaboration tool that provides global, remote, and dispersed teams with the ability to work together and share information via a common space.

- You can utilize cool features like document collaboration, one-on-one chat, team chat, and more.

- Skype for Business (SfB) is scheduled for end-of-life in July 2021. Teams will replace SfB at some point in the future.

Office 365

Microsoft Teams is a part of the Office 365 cluster:

- **Teams**, as the hub for teamwork, is where people can actively connect and collaborate in real time to get things done. Have a conversation right where the work is happening, whether coauthoring a document, having a meeting, or working together in other apps and services. Teams is the place to have informal chats, iterate quickly on a project, work with team files, and collaborate on shared deliverables.

- **Outlook** for collaborating in the familiar environment of email and in a more formal, structured manner or when targeted and direct communication is required.

- **SharePoint** for sites, portals, Team channel's document storage <public/private>, intelligent content services, business process automation, and enterprise search. SharePoint keeps content at the center of teamwork, making all types of content easily shareable and accessible across teams. Tight integration with Outlook, and Teams enables seamless content collaboration across conversation experiences.

- **OneDrive for Business** for storing files and sharing them with people that a user invites (using Files menu button in left nav). Content that a user saves to OneDrive for Business is private until the user shares it with others, making it the best option for storing personal and draft documents that are not intended to be shared or not ready to be shared.

- **Office Apps** are all the familiar tools that people know and use regularly, including Word, Excel, PowerPoint, and OneNote.

Accessing Teams

The NLRB Active Directory (AD) gives you immediate access to the Teams, your logon credentials aren't needed.

You can access it directly from your Desktop.

Membership, Roles and Settings

Team membership

- Teams makes it easy for team owners to add people in the organization based on their name. Depending on your organization's settings, guests who are team members but outside of your organization cannot be added to your teams. Team owners can also create a team based on an existing Microsoft 365 group. Any changes made to the group will be synced with Microsoft Teams automatically. Creating a team based on an existing Microsoft 365 group not only simplifies the process of inviting and managing members, but also syncs group files inside of Microsoft Teams.

Team roles - There are two main roles in Microsoft Teams:

- **Team owner** - The person who creates the team. Team owners can make any member of their team a co-owner when they invite them to the team or at any point after they've joined the team.

- **Team members** - The people who the owners invite to join their team.

Team settings

- Team owners can manage team-wide settings directly in Microsoft Teams. Settings include the ability to add a team picture, set permissions across team members for creating standard and private channels, adding tabs and connectors, @mentioning the entire team or channel, and the usage of emojis, GIFs, stickers, and memes.

3 Core Teams Functionalities

1. **Communication** – teams need to be able to efficiently talk, share ideas, give answers, provide context and offer guidance to one another.

2. **Collaboration** – teams have common tools for working on shared tasks.

3. **Coordination** – teams obtain visibility on each other's progress and direction.

Communication

- Meetings
- Presentations
- Messages
- Posts
- One on one calls
- Chats
- Video calls

Collaboration

- Creating content with other teams
  - Working together on group projects
  - Direct access to Agency Intranet (SharePoint) resources
  - Sharing Files
  - Coauthoring Word documents
  - Tasks (Microsoft Planner)
  - Wiki's

Coordination

- Ongoing team processes:
  - Documents
  - Tracking a project's progress
  - Meetings
  - Planner
  - Chat

General Channel

- When creating a Teams channel the General channel is created by default.

- It's the starting point to begin collaboration with Team members.

- Should be used for general conversation among team members.

- Specific conversations should be reserved for channels (topics) related to that conversation.
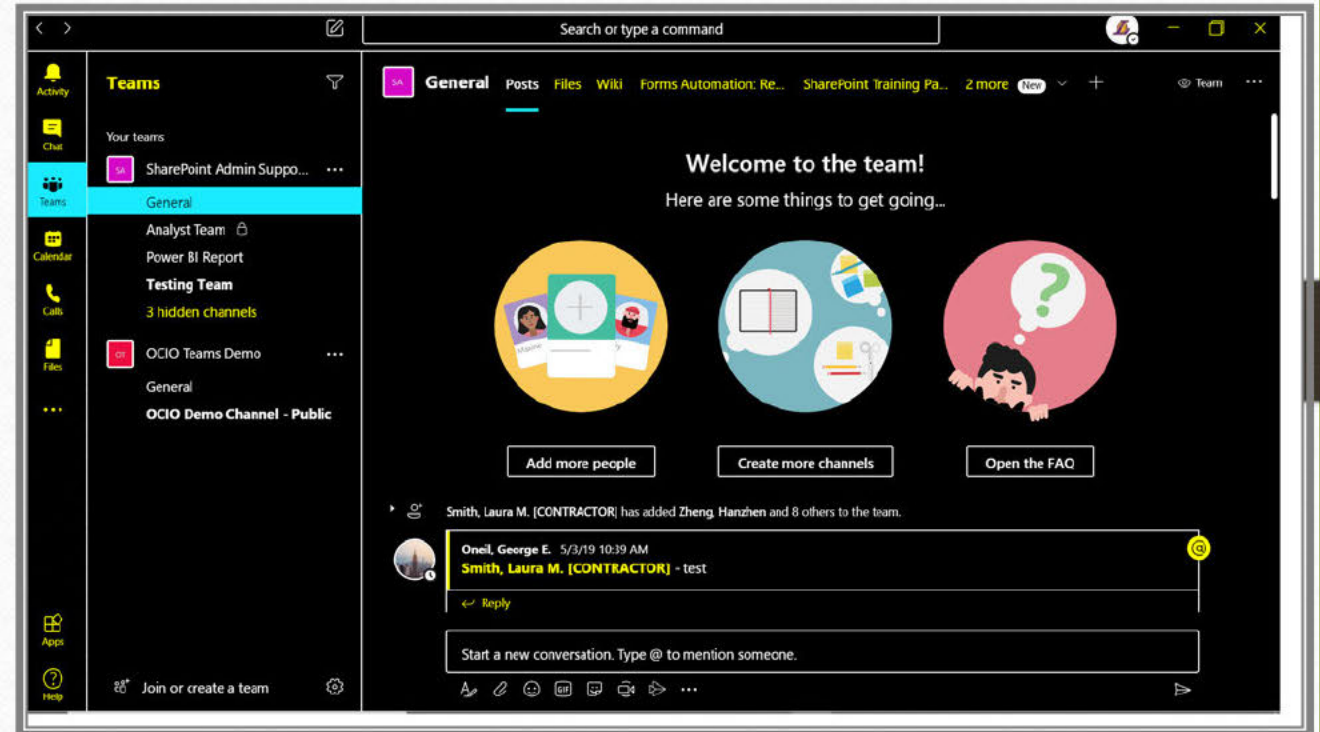
Teams Channel

- **Channels** are dedicated sections within a team to keep conversations organized by specific topics, projects, disciplines. Files that you share in a channel (on the Files tab) are stored in SharePoint.

- **Channels** are places where conversations happen and where the work gets done. Channels can be open to all team members or, if you need a more select audience, they can be private. Standard channels are for conversations that everyone in a team can participate in and private channels limit communication to a subset of people in a team.

- **Channels** are most valuable when extended with apps that include tabs, and connectors, that increase their value to the members of the team.

Conversations (Chat)

- **Chat** – In Microsoft Teams you can send a message to one or more people using chat. The message can contain text, images, GIFs, a recorded voice message, a video clip – pretty much any type of media. The chat message is exclusive to the people in that chat. Any files you share in the chat are uploaded to your OneDrive folder giving automatic editing permissions to everyone in the chat.

- Using **Chat**, you can @mention anyone in your organization.

- **Channel posts** – The other way to send a message is to write it in a channel post. Those messages are only visible to the members of the Channel.

Files (Private)

- You can access your private files within OneDrive and Teams, via the left side panel File icon or in your private channels.

- When you click the icon, a list of your private files will display with the following options: Edit in Teams, Open in Browser, Open in Desktop App, and get the link to the File.

- Files that you share in a private or group chat are stored in your OneDrive folder and are only shared with the people in that conversation. These will be found in the Files tab at the top of a chat.

Files (Public)

- You can access your Public Files from the Files menu button in your respective Teams Channel at the top of each channel.

- When you click the icon, a list of files will display with the following options: Open online, Open in SharePoint, Move, Copy, Download, Delete, Rename and get the link to the File.

- Files that you share in channel posts are stored in your team's SharePoint folder which can be found in the Files tab at the top of each channel.

Video Meetings

- When you join a Meeting, you have the option to select **Video or Audio** with Team Members and other Agency staff.

- You can also start a **Video Meeting** by clicking the **Meet Now** icon in your Teams Calendar page.

- **Video** or **Audio** call to someone from a **Chat** session.

- **Video** or **Audio** call directly from a contact card in the Teams **Calls** page.

Phone Calls

- One to one Calls

- Start an instant meeting/call

- Share content in a meeting/call

- Join a meeting in Teams

- Schedule a meeting/call

- Speed Dial Calls

- Call in to a meeting

- Start a call from a chat

- Call a phone number

- Create Group Calls

- Access Voice Mail

Apps

- Find your personal apps by clicking on the **+** Add a Tab Icon on the top Menu of any Channel's page.

- Click **More apps** to see your personal apps. You can open or uninstall them.

- You click the apps you want to use in Teams, choose the appropriate settings, and **Add**. Or you can search for an **App** and **Add**.
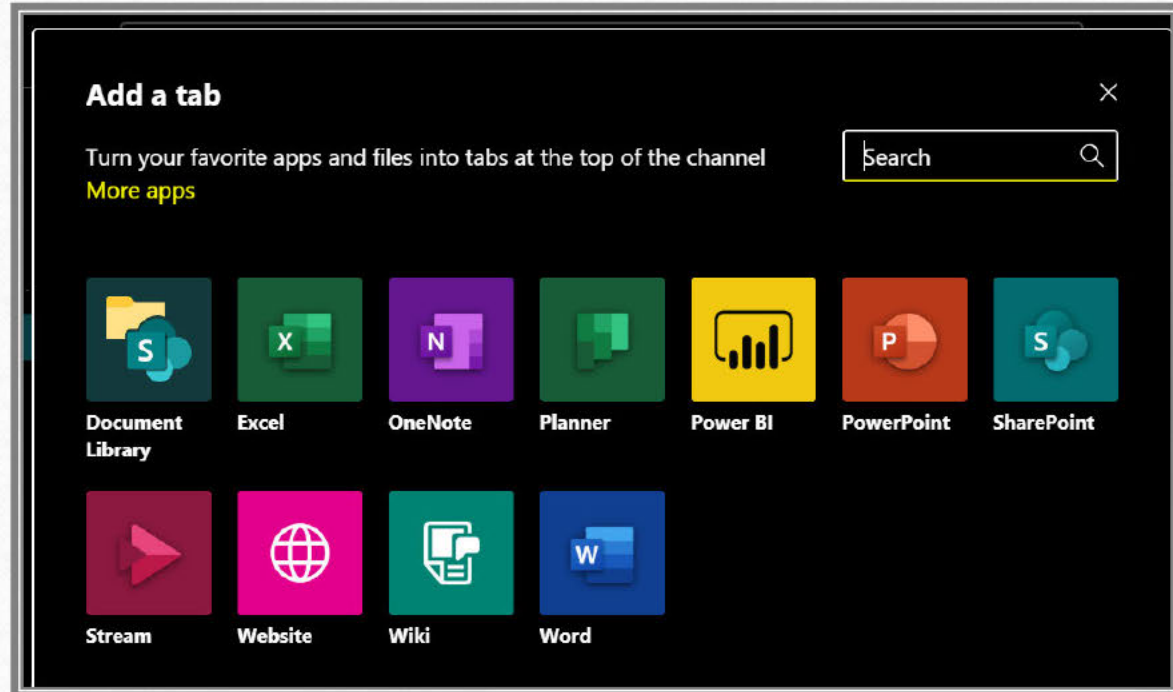
Questions/Help?
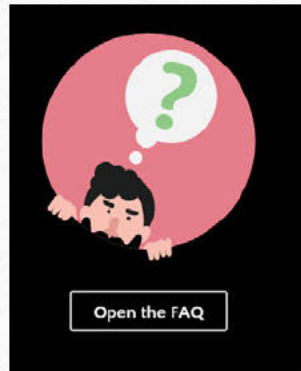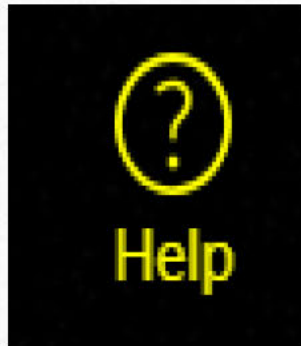
- Click the Help icon at the bottom of the left side menu.

- FAQ – You can access the Teams FAQ at the top or your General Channel Page or by clicking the Help icon at the bottom of left side menu.

- Microsoft Teams Training Page

- Or you may submit your questions to ▮(b) (7)(E)▮ and the SharePoint team will provide assistance.

Managing Teams

- ***Can I create a Team?***

  - No. To request a new Team, please submit a Teams Request via the OCIO ServiceDesk via email at (b) (7)(E)⬛⬛⬛⬛⬛⬛⬛⬛.

- ***Can I assign team members?***

  - Currently, team membership is managed through OCIO. The OCIO will review requests to add team members by submitting a request via the OCIO ServiceDesk via email at (b) (7)(E)⬛⬛⬛⬛⬛⬛⬛⬛

- ***Are Teams automatically created for the offices/departments?***

  - A Microsoft Team has been created for every office/department in conjunction with the Shared Drive Migration Project. If you don't see a Team created for your office/department, please submit a ticket via the OCIO ServiceDesk via email at (b) (7)(E)⬛⬛⬛⬛⬛⬛⬛⬛

- ***Who can change a Teams name?***

  - Currently there is no option to change the name of a Team.

- ***Can any shared file uploaded in Teams be edited by all members of that site?***

  - All members of a team can review, edit and upload files for the Teams/Channels for which they are a member.

- ***Should I create one Team or multiple channels?***

  - That depends. Teams are created to support office collaboration. If you are working on a project for your office, a channel may be a better option.

- ***Can I change the look and feel of my Team?***

  - There are only two changes that can be made to the appearance of Teams:

    1) The "theme" for the entire application can be changed from light to dark or high contrast.

2) The icon for an individual, can be changed to any picture you upload.

- ***Can I change the chronology of posts so that the most recent is the top?***

  - Teams displays Posts in the order in which they were entered. You can search to find a specific post.

Microsoft Teams Use

- ***Is there a connection between Skype and Teams?***

  - No. Teams will replace Skype for Business.

- ***Will Teams integrate with Microsoft Office, Outlook, and NxGen***

  - There is no direct integration with Teams to other applications other than Microsoft Office 365 (e.g., Outlook, Word, Excel, etc.). Office files stored within Team sites or channels can be opened and edited directly within Teams. You can also create new Office files directly within a Team/Channel or upload existing files for sharing. Your Outlook calendar is also integrated within Teams.

- ***Should we begin to work in Teams immediately after this training?***

  - Every employee at NLRB has access to MS Teams today and can begin using it immediately. You will also be able to use Teams for external calling once your office is migrated from Skype to Teams Only Mode. Teams can be used for internal calling today.

- ***What's the difference between posting and emailing?***

  - Posting in Teams and Emailing are two separate processes. You can send emails from Outlook. You can create Posts in your Teams Channels and send messages in your Private or group Chats.

- ***What is the retention period for chats in Teams?***

  - Personal or one-to-one chats are deleted after 24 hours. Meeting notes, Teams and Channel chats are retained permanently.

Microsoft Teams Frequently Asked Questions

- ***Can files uploaded in Teams be edited by anyone within the team?***

  - Yes. Files uploaded and shared in Teams are accessible to every member of that Team and/or Channel.

- ***Can we still use Skype?***

  - Yes, for now. NLRB plans to retire Skype for Business on or around May 2021.

Meeting and Calendars and Outlook

- ***Does the meeting process apply the same to requesting meetings with people outside our organization?***

  - Yes. Outside participants can now be invited to your Teams meeting.

- ***Can I integrate the Teams calendar with Outlooks calendar?***

  - You can use your Outlook Calendar to schedule and view your Teams Meeting. When creating a calendar invitation, choose the Teams Meeting option to add your Team information.
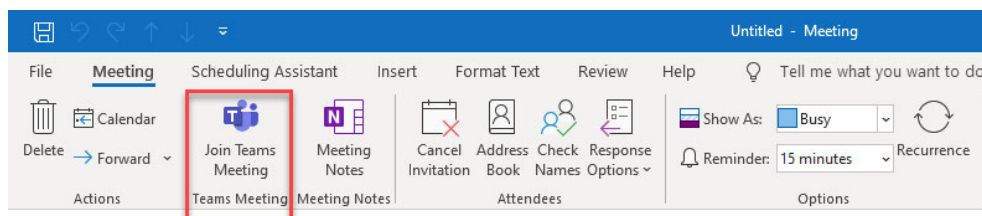
- ***Can I set up a meeting for a whole team or a whole channel (without entering all the invitees)?***

  - Yes, but only when creating the meeting from within Teams.

- ***Does the scheduling assistant include Teams and Outlook calendar events or only Teams-based events?***

  - Yes. The Scheduling Assistant works the same for Outlook and Teams for any scheduled meetings and Events.

- ***Can external users be invited to a Teams meeting?***

  - Yes.

Microsoft Teams Frequently Asked Questions

- **Do external users need to have Teams installed on their computer or mobile device?**

    - External users have the option of using a web browser or can download/use the Teams application directly from Microsoft as desired.

Teams and NxGen

- *Can the information saved in Teams be integrated with NxGen?*

    - Users will continue to adhere to existing Case Processing procedures.

- *Is there a function for uploading into NxGen?*

    - NxGen and Teams are not integrated.

- *How would we save posts, replies, or chats in order to preserve them or upload them elsewhere (like our NxGen case file(s)), if needed?*

    - The only current method to save a post, reply or chat and upload them elsewhere would be to download a screen capture and upload it to the other system. You should abide by current Case Processing procedures.

Phones call and chats in Teams

- *Is there a way to retain personal chats for longer than 24 hours?*

    - The current Agency policy is that one-to-one chats are only retained for 24 hours.

- *Will we be able to make calls from our regular work phones or will all our calls be made through Teams?*

    - Teams works with your new agency desk phone in addition to the iPhone mobile app or your computer. You can choose the device that best fits your calling situation. For more information, please contact the OCIO Service desk (b) (7)(E) for this question.

- *Can you screenshot a chat?*

Microsoft Teams Frequently Asked Questions

- Teams does not have built in screenshot functionality. You can create a screen shot of your Teams screen using another software application, i.e., Microsoft Paint, and Microsoft Snip and Sketch, outside of the Teams application.